


How To

Create your own dealfunnel snapshots

1. Resources

- Report on Historical Data with Reporting Snapshots 
https://help.salesforce.com/s/articleView?id=sf.data_about_analytic_snap.htm&type=5
- Dashboard Dōjō - Hands-on Salesforce Reporting Snapshots
https://www.youtube.com/watch?v=GbrWuhX_X0
- How to create Reporting Snapshot in Salesforce | Salesforce tutorials
<https://www.youtube.com/watch?v=lpdvRo4Ga8w>

2. Basic steps

a. Create a source report

Report: Investment Opportunities with Account
Dealfunnel Snapshot Source Report

Total Records: 17 Total Estimated Investment Size: EUR 59,694,000.00

	Investment Opportunity: Investment Opportunity Name	Account: Account Name	Start Date	Status	Opportunity Source	Estimated Investment Size	Lead rating	Investment Opportunity: Owner Name
1	VL Test IO	VL Test Account	6/2/2023	1. New	Corporate finance advisor	-	☆☆☆☆	Admin Venturelytic
2	Adidas Seed	Adidas	1/3/2023	2. Hot	Corporate finance advisor	EUR 5,000,000.00	☆☆☆☆	Martin Mainz
3	Basic Fit Series A	Basic Fit	1/31/2023	3. Bid	Event	EUR 5,000,000.00	☆☆☆☆	Martin Mainz
4	Twitter Series C	Twitter	1/17/2023	2. Hot	Incubator	EUR 600,000.00	☆☆☆☆	Mathijs Heutink
5	Pfizer Seed	Pfizer	11/28/2022	4. LOL	External	EUR 500,000.00	☆☆☆☆	Admin Venturelytic

b. Create custom target object

Setup > Object Manager

Investment Opportunity Snapshot

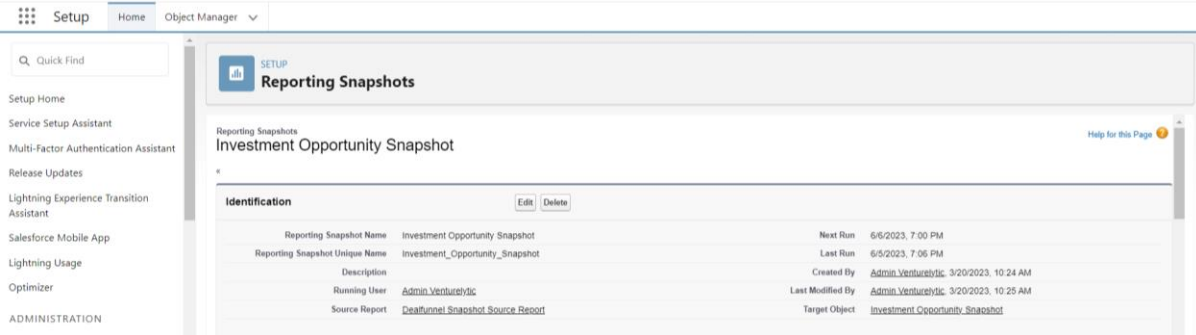
Details

Fields & Relationships
11 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Account_Name__c	Text(255)		
Created By	CreatedById	Lookup(User)		
Currency	CurrencyIsoCode	Picklist		
Estimated Investment Size	Estimated_Investment_Size__c	Currency(18, 0)		
Investment Opportunity Name	Investment_Opportunity_Name__c	Text(255)		
Investment Opportunity Owner	Investment_Opportunity_Owner__c	Text(255)		
Investment Opportunity Snapshot Name	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date		



c. Setup a reporting snapshot (Setup>Reporting Snapshot)



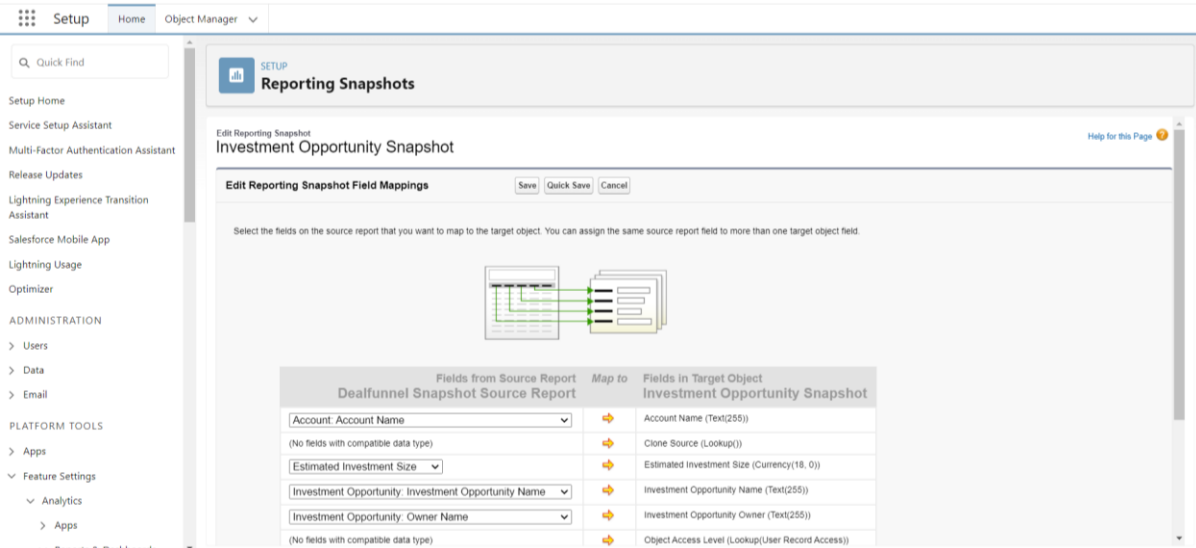
Reporting Snapshots

Reporting Snapshot: Investment Opportunity Snapshot

Identification

Reporting Snapshot Name	Investment Opportunity Snapshot	Next Run	6/6/2023, 7:00 PM
Reporting Snapshot Unique Name	Investment_Opportunity_Snapshot	Last Run	6/5/2023, 7:06 PM
Description		Created By	Admin.Venturelytic
Running User	Admin.Venturelytic	Last Modified By	Admin.Venturelytic
Source Report	Dealfunnel Snapshot Source Report	Target Object	Investment Opportunity Snapshot

d. Map the fields from the Source Report with the Target object



Reporting Snapshots

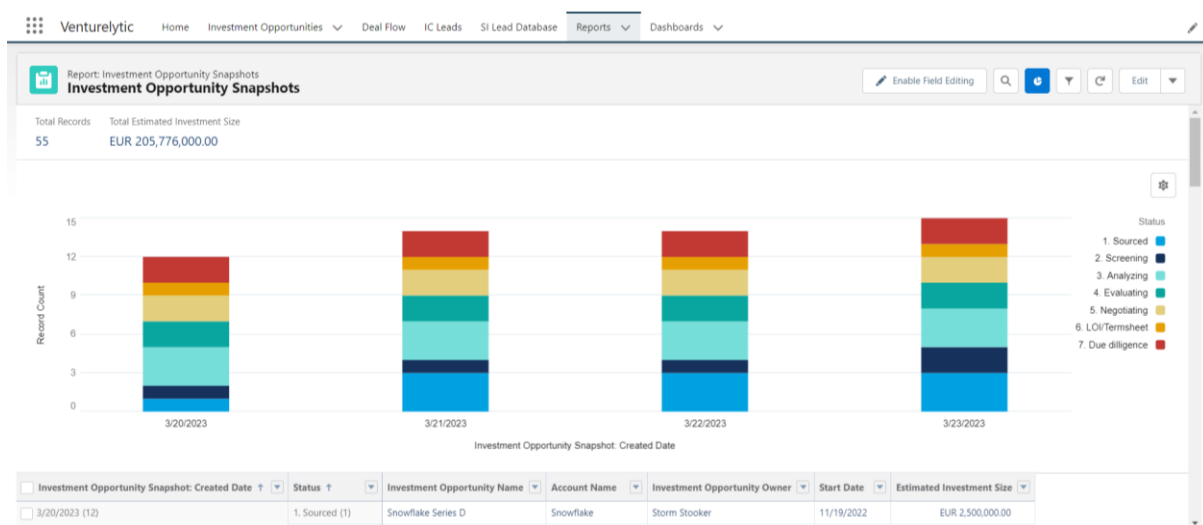
Edit Reporting Snapshot: Investment Opportunity Snapshot

Edit Reporting Snapshot Field Mappings

Select the fields on the source report that you want to map to the target object. You can assign the same source report field to more than one target object field.

Fields from Source Report	Map to	Fields in Target Object
Account: Account Name	→	Account Name (Text(255))
(No fields with compatible data type)	→	Clone Source (Lookup())
Estimated Investment Size	→	Estimated Investment Size (Currency(18, 0))
Investment Opportunity: Investment Opportunity Name	→	Investment Opportunity Name (Text(255))
Investment Opportunity: Owner Name	→	Investment Opportunity Owner (Text(255))
(No fields with compatible data type)	→	Object Access Level (Lookup(User Record Access))

e. Create a new report based on your target object



Additional questions? Reach out to support@venturelytic.com to setup snapshots of your funnel.